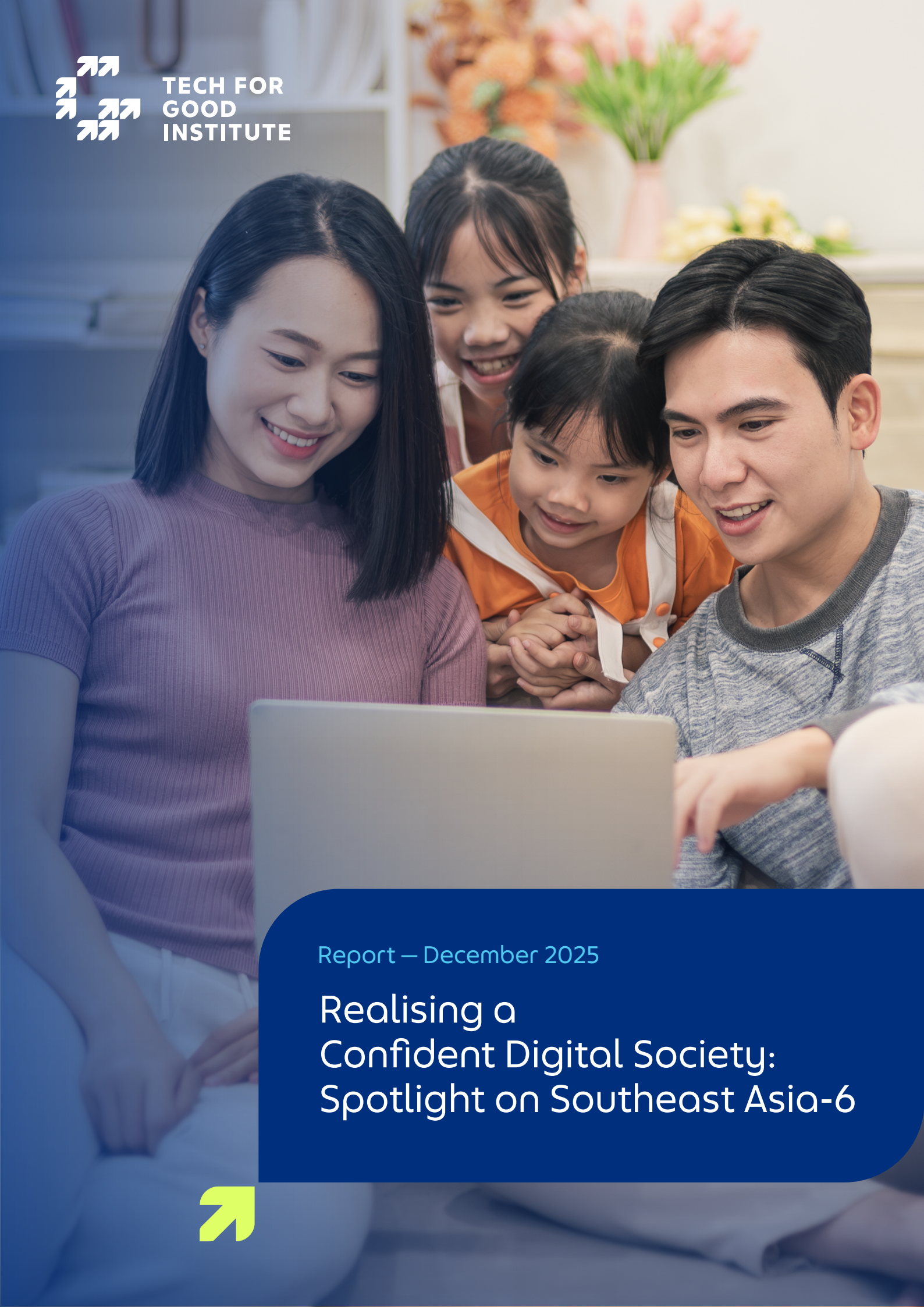




TECH FOR
GOOD
INSTITUTE



Report – December 2025

Realising a Confident Digital Society: Spotlight on Southeast Asia-6



About This Study

In 2023, the Tech for Good Institute (TFGI) published the report, *From Tech for Growth to Tech for Good*, which explored the ambitions of the Southeast Asia-6 countries (SEA-6) — Indonesia, Malaysia, the Philippines, Singapore, Thailand, and Vietnam — for the next phase of digital development in the region. The report underscored a shared broadening of goals, shifting from a primary focus on rapid digital economy growth to a more holistic vision of responsible digital development. Central to this vision is fostering a “Confident Digital Society,” positioned as a parallel objective to industry transformation and economic progress.

This study examines the concept of a “Confident Digital Society”, including what it means, what it comprises, and how it can be measured. An earlier white paper released this year served as the basis for consultations with key stakeholders across the region. Using selected indicators and incorporating feedback from a range of experts, we have identified relevant data sources and refined the conceptual framework to better reflect regional realities and aspirations. Changes to the framework mainly involve the expansion of sub-pillar definitions to include, among others: equitability of access, user experience of internet services, digital rights and freedoms, safety and security of digital platforms as enablers for participation, online innovation outputs, outlook on emerging technologies, and e-waste and green energy policies.

This study primarily focuses on the SEA-6 countries. Brunei, Cambodia and Laos are assessed to inform the overall regional performance, but are not discussed at the country level due to missing data concerns. Future editions may expand the geographic scope, e.g., to the rest of the Association of Southeast Asian Nations (ASEAN), or deepen the empirical base, but this edition is intended primarily as a conversation starter for the region. Feedback and suggestions are welcome and may be directed to info@techforgoodinstitute.org.

About the Tech for Good Institute

The Tech for Good Institute (TFGI) is a non-profit policy research institute working to advance the promise of technology and the digital economy for inclusive, equitable and sustainable growth in Southeast Asia (SEA).

TFGI serves as a platform for research, conversations and collaborations focused on SEA, while staying connected to the rest of the world. Our work is centred on issues at the intersection of technology, society and the economy, and is intrinsically linked to the region's development. We seek to understand and inform policy with rigour, balance and perspective by using research, effective outreach and evidence-based recommendations.

TFGI works in partnership with the Mastercard Center for Inclusive Growth and Grab, to advance the vision of a thriving and innovative SEA for all. We welcome opportunities for partnership and support, financial or in-kind, from organisations and individuals committed to fostering responsible innovation and digital progress for sustainable growth in the region.

More information about the Institute can be accessed at www.techforgoodinstitute.org



Acknowledgements

The Tech for Good Institute (TFGI) would like to thank our contributors for their invaluable inputs and feedback on this paper's conceptualisation:

- **Adrian Wan** Internet Society, Singapore
- **Antoinette Raquiza, PhD** Asia Pacific Pathways to Progress Foundation, Philippines
- **Bensen Koh** GSMA, Singapore
- **Carol Soon, PhD** National University of Singapore, Singapore
- **Chutima Suttiaprapa** Thailand Development Research Institute, Thailand
- **Ebinezer R. Florana, PhD** University of the Philippines, Philippines
- **Ellina Roslan** MyDigital, Malaysia
- **Farlina Said** Institute of Strategic & International Studies, Malaysia
- **Jorij Abraham** Global Anti-Scam Alliance, Netherlands
- **Kartina Sury, PhD** Center for Indonesian Policy Studies, Indonesia
- **Minh Thao Nguyen, PhD** National Institute for Economics and Finance, Vietnam
- **Rachel Teo** Google, Singapore
- **Sak Segkhoonthod, PhD** Electronic Transactions Development Agency, Thailand
- **Salbiah Idris** Khazanah Research Institute, Malaysia
- **Sheila Devi Michael, PhD** Universiti Malaya, Malaysia
- **Oliver Reyes** UP Law Center, Philippines
- **Waqas Hassan** Global Digital Inclusion Partnership, Singapore
- **Wayan Agus Purnowo** American Chamber of Commerce in Indonesia, Indonesia

In addition, TFGI extends its sincere gratitude to the following experts for their participation in the pre-publication peer review of this report. Their technical insights were instrumental in strengthening the conceptualisation and development of the Confident Digital Society Index, particularly in areas such as indicator selection, aggregation, and normalisation.

- **Reuben Ng, PhD** Lee Kuan Yew School of Public Policy, Singapore
- **Minh Thao Nguyen, PhD** National Institute for Economics and Finance, Vietnam
- **Prani Sastiono, PhD** Lembaga Pendidikan Ekonomi dan Masyarakat, Indonesia

The views expressed in their feedback are their own and do not necessarily reflect those of their respective organisations.

TFGI is also grateful to Grab for supporting TFGI's mission of leveraging the promise of technology and the digital economy for inclusive, equitable and sustainable growth in Southeast Asia. Funders do not determine research findings nor the insights and recommendations of research.

Disclaimer

The information in this paper is provided on an "as is" basis. This paper is not to be considered as a recommendation for investments in any industry. This document is produced by the Tech for Good Institute (TFGI) and has been prepared solely for information purposes over a limited time period to provide a perspective on the region. TFGI and any of its affiliates or any third party involved make no representation or warranty, either expressed or implied, as to the accuracy or completeness of the information in the report, and no responsibility or liability whatsoever is accepted by any person of TFGI, its affiliates, and its respective officers, employees or agents.

Copyright © 2025 by the Tech for Good Institute. All rights reserved.

Permission is granted for reproduction of this file or its contents, with attribution to the Tech for Good Institute.

Executive Summary

Southeast Asia (SEA) sustains its digital momentum, generating *USD 300 billion in gross merchandise value (GMV)* in 2025 and maintaining *growth at 15% year over year*. Digitalisation has also produced tangible social impact for the region at the national, organisational and individual levels. It is viewed as a tool for unlocking efficiencies, enhancing service delivery, broadening access to goods and services, and fulfilling sustainable development goals. However, it also brings new risks and harms, ranging from contributing to the widening developmental divide to cybercrimes.

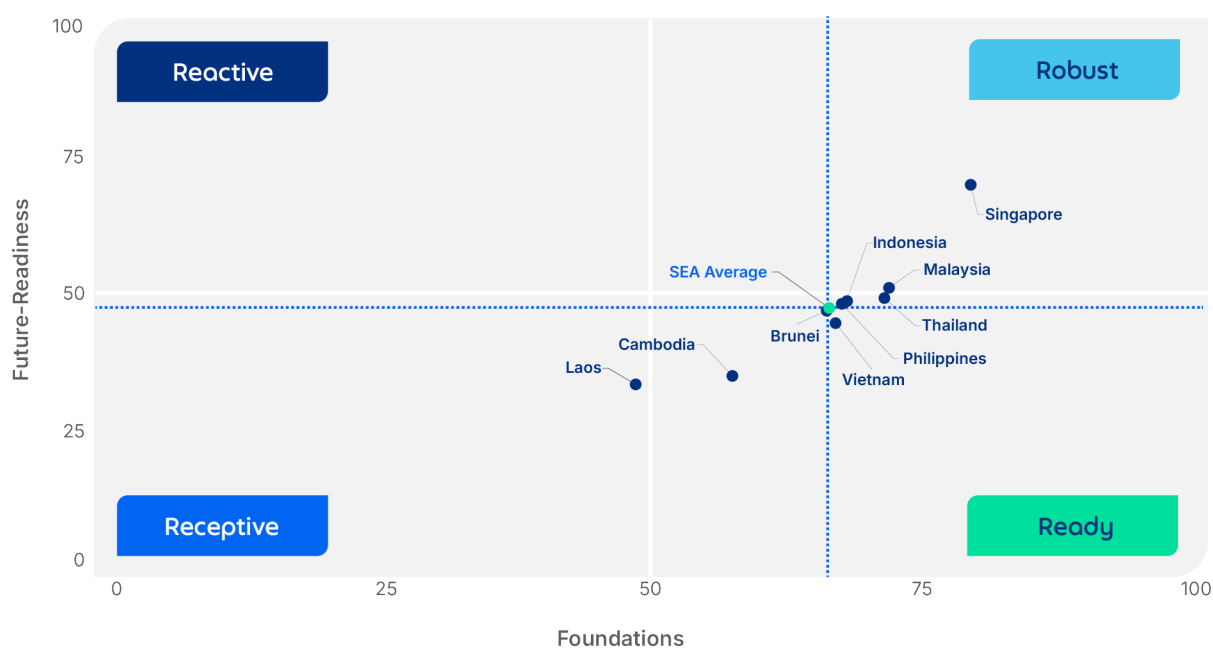
The 2023 TFGI report, From “Tech for Growth” to “Tech for Good”, identified a Confident Digital Society as an enabler for sustainable digital development. A confident digital society is one in which all stakeholders participate in, benefit from, and are empowered by digital technologies. Such a society fosters digital trust and advances the public interest, which in turn creates a continuous enabling environment for the adoption of digital goods and services.

Further consultations across the region in 2025 highlighted the need for a more holistic definition of digital society, going beyond access, infrastructure, and institutions to consider the long-term impact and sustainability of digitalisation. This report builds on the *initial framework* for defining and measuring *Confident Digital Society* by proposing metrics for each pillar and sub-pillar of the framework, with recommendations informed by insights generated through this inquiry. The Southeast Asia-6 countries (Indonesia, Malaysia, Philippines, Singapore, Thailand, Vietnam) are the focus of the report, while Brunei, Cambodia and Laos are assessed to contextualise the overall regional performance.

The Confident Digital Society framework balances the current state of digital development (Foundations) with forward-looking initiatives (Future-Readiness). These dimensions span four pillars: *Quality Access, Meaningful Participation, Productive Potential* and *Digital Resilience*.

This study found that SEA countries have invested significantly in the foundations for digital development and display varied levels of future-readiness. Singapore and Malaysia lead the region in harnessing emerging opportunities brought about by digital technologies. Thailand and Indonesia show particular strengths in digital public infrastructure and digital resilience. Meanwhile, the Philippines and Vietnam exhibit stable *foundations* but have room to grow in building *future-readiness* in digital governance, infrastructure, and enterprise and workforce capabilities.

Figure 1. Confident Digital Society in SEA



Source: Tech for Good Institute, 2025

Opportunities for building confident digital societies across and for the region include:

- Addressing the growing need for equitable, affordable, and more importantly, reliable internet services, given that the speed, coverage and consistency of internet services in SEA lag behind that of global peers.
- Ensuring safe, secure and trustworthy digital platforms for empowered digital participation, amid growing distrust and lower confidence in technology use due to cyber threats and remaining gaps in digital public infrastructure.
- Leveraging digital transformation for productivity and innovation while mitigating the negative effects of technological disruptions, given limited digital talent pipelines, inadequate social protections, and fledgling business environments.
- Exploring new approaches to governance that strengthen digital resilience, in the context of increasingly sophisticated online risks and harms, growing vulnerability to climate risks, limitations in environmental sustainability strategies to address the burden of technology use, and the evolving digital landscape.

The cultivation of a Confident Digital Society is vital to continued digital economy growth, as well as the achievement of development goals. This requires SEA to broaden its digitalisation agenda to include priorities that promote a sustainable, inclusive and empowered digital society.

Digital integration efforts will be key to SEA leapfrogging towards its developmental goals by leveraging technology. Beyond this, there are general policy recommendations that each country can work towards, such as:

Facilitating inclusive, affordable and reliable access to digital goods and services through enhanced market policies and standards, streamlined application processes, and development of shared public resources.



Strengthening cybersecurity, data protection, right to information laws, and related measures to increase digital trust and deepen digital participation, supported by national digital literacy programmes and integrated digital public infrastructure.



Boosting workforce and enterprise productivity through integrated skills development pathways aligned with job demand for digital competencies, regulations for the use of disruptive technologies, university and industry partnerships to improve digital innovation output, and robust, fit-for-purpose policies for social protections, credit, investment and operational stability.



Developing, implementing and enforcing adaptive, evidence-backed strategies for digital resilience, including ramping up operationalisation of cybersecurity measures, integrating environmental sustainability and digital transformation roadmaps, and adopting novel governance tools and approaches.





 Tech For Good Institute

www.techforgoodinstitute.org